SOFO Financial Assistant

POSITION DESCRIPTION

Student Organization Finance Office (SOFO) Financial Assistants are responsible for the effective operation for the Norris University Center, its departments, and for recognized student organizations. A SOFO Attendant is a representative of the Norris Business Operations at all times while on duty. It is a position that comes with financial responsibility and accountability.

HUMAN RESOURCES DETAILS

| Work Study Applicable |
| Shifts: Monday through Friday – 9 a.m. to 5 p.m. |
| Starting Wage: $8.25/hour |
| Reports to: SOFO Student Supervisors, SOFO Staff Assistant, and SOFO Financial Coordinator |

ESSENTIAL FUNCTIONS

SOFO Financial Assistants report directly to the SOFO administrative team comprised of the SOFO Financial Coordinator, the SOFO Accounting Assistant, and the SOFO Student Supervisors. Duties include: providing front line customer service to student organization officers; offering preliminary screening of transaction requests and their supporting documentation; and the shepherding transactions to completion. Financial Assistants serve as informational resources—focusing on SOFO policies, procedures and best practices—for student leaders and their staff advisors. Responsibilities include filing, check processing, data entry, and assisting group treasurers in balancing their organization ledger books quarterly. Other duties may be assigned by the SOFO Financial Coordinator, SOFO Staff Assistant, or Student Supervisors.

Financial Assistants are required to attend regular meetings with entire SOFO staff. Financial Assistants are expected to participate in a paid fall training program for all Norris student employees. They are subject to quarterly reviews by the SOFO Student Supervisors and evaluations and learning assessments by the SOFO Accounting Assistant or SOFO Financial Coordinator.

MINIMUM SKILLS AND QUALIFICATIONS

- Current Northwestern University undergraduate student
- Customer service experience
- Attention to detail
- Reliable, organized and good interpersonal skills
- Computer knowledge a must
- Accounting knowledge preferred, but not required
- Ability to multi-task
**OUTCOME EXPECTATIONS AND RESPONSIBILITIES**

**CUSTOMER SERVICE**

- **Customer Interaction** – articulates clearly and listens to customers, maintains good eye contact and focuses on individual customer, and puts the customer first
  - Greets customers as soon as they arrive to service window
  - Maintains professional and positive attitude during a transaction

- **Presentation** – positive image and reflection of self and the Norris Center
  - Wears nametag during shift and is well groomed
  - Service area must be clean and organized

- **Customer Satisfaction** – follows through with customers in order to meet their expectations for service, and is persistent and creative in meeting customer needs
  - Be easily approachable to clients and fellow Norris Staff at service window
  - Be articulate when answering office phone line
  - Going above and beyond customer expectation especially with non-related SOFO questions

**RESPONSIBILITY**

- **Attendance** – arrives on time for shifts, works during scheduled hours and makes arrangements for replacements as needed
  - Maintains and follows personal schedule and makes adjustments accordingly.
  - Always make sure to swipe in with wildcard and to sign attendance sheet
  - To attend quarterly SOFO meetings as needed
  - To attend Norris training program

- **Accuracy** – is precise and works within allotted time frames, acknowledges when mistakes or missed deadlines occur and notifies supervisor appropriately
  - Completes tasks as assigned in a timely manner meeting all expectations.
  - Verifies work before posting transactions
  - Checks organization's account status before making recommendations
  - Consults SOFO Policies and Procedures and with the SOFO Administrative team frequently to ensure that he/she is aware of any changes to them

- **Accountability** – makes appropriate decisions regarding behavior, recognizes and accepts consequences of actions, and acts in a dependable manner
  - Contacting the appropriate student officers when finding an error on documentation after it has been accepted

- **Job Knowledge** – knows job description and understands what the job entails, knows relevant information and policies, and seeks clarification when needed
  - Review and comprehend SOFO policies and procedures
  - Review and comprehend SOFO staff handbook (power point presentation)
  - Understand basic accounting principles
  - Understands office security
  - Asks questions and provides feedback to better develop personal knowledge
  - Knows the hierarchy of the Norris Business Operations department and the administrators to contact if the SOFO Financial Coordinator and SOFO Assistant are unavailable
  - Has perspective of the SOFO Attendant role as it relates to the Norris University Center mission

**TEAMWORK**

- **Communication** – communicates information to team members, customers, and team leadership, and displays ability to adjust communication style appropriately
  - Reviews issues log for recommendations given regarding insufficient documentation reviewed at service window
  - Writes issues log clearly and concisely for staff members to understand
  - Reviews emailed log for messages sent to group officers with recommendations needed in order to process checks

- **Group Participation** – attends team meetings and contributes to dialog, and supports others and
appropriately adapts behavior in response to team needs
  o Effectively contributes during meetings, sessions, and events
  o Acts as a team player who collaborates, cooperates, and communicates openly and productively

💡 Values Difference – relates well with team members from diverse backgrounds, interests, and values, and understands, recognizes and behaves appropriately when cultural differences exist
  o Sensitive to diverse and varying needs of all student groups and staff

LEADERSHIP
💡 Empowerment – recognizes individual and group contributions, and celebrates accomplishments and encourages others to act and make decisions
  o Ability to acknowledge and support others’ personal accomplishments

AUTONOMY
💡 Enforcement of Policies – uses and upholds rules and guidelines of job, and makes appropriate exceptions when the situation calls for it
  o Consistent when relaying SOFO policies and procedures to student officers and group advisors
  o Understand and comprehend Norris Policies

💡 Initiative – demonstrates ability to initiate action and contribute ideas to improve area, and works well with minimal supervision
  o Ability to complete all tasks without constant supervision
  o Contributes ideas to improve office operations and assists in the implementation of new policies and initiatives

💡 Decision Making – displays ability to make good choices, and understand how to use his or her talents and skills to best accomplish tasks
  o Capable of providing answers for student officers or Norris visitors when supervisors are unavailable
  o Assists in the interviewing, hiring, training, and disciplining of work study staff

💡 Problem Solving – deals with unforeseen situations professionally, and is adaptable, flexible, and able to work under conditions of ambiguity
  o Ability to answer Norris visitors’ questions not related to SOFO

ADDITIONAL POSITION-SPECIFIC OUTCOME EXPECTATIONS